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**REGIONAL INTEGRATION OF INFORMATION ACTIVITIES:  
A DONOR'S VIEWPOINT**

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In the information field, networks are much more attractive to donors than are the uncoordinated activities of separate institutions. Networks offer promise for avoiding duplication of work and for delivering a greater range of services to clients. They resolve the question of whether particular institutions have an appropriate "mandate" for their proposals, and they ensure the establishment of mechanisms for the management of methodologies by consensus. Within the framework of a network, training can be more highly focused and, hence, more immediately productive. In seeking support of donors, applicants should ensure that the scope of network activities has been precisely defined, that a sufficient degree of standardization has been adopted to ensure compatibility of data, that agreement has been reached on those activities that need to be centralized, and that prospects are good for self-reliant operation when donor support ceases.



**INTEGRACION REGIONAL DE LA INFORMACION:  
PUNTO DE VISTA DEL DONANTE**

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En el campo de la información, las redes son mucho más atractivas para los donantes que las actividades no coordinadas de las instituciones individuales. Las redes de información ofrecen la promesa de evitar duplicaciones de trabajo y de hacer llegar a sus clientes una gama de servicios más amplia. Ellas resuelven la cuestión de si una institución en particular tiene el "mandato" adecuado para sus propuestas, y aseguran, por medio del consenso, el establecimiento de mecanismos para el manejo de metodologías. Dentro del cuadro de una red, se puede enfocar mejor la capacitación y, por lo tanto, ella puede ser productiva de una manera más inmediata. Al pedir el apoyo de donantes, los candidatos deben asegurarse que el alcance de las actividades de la red se ha definido de manera precisa, que un nivel de estandarización suficiente para asegurar la compatibilidad de los datos se ha adoptado, que se ha llegado a un acuerdo sobre cuales actividades deben ser centralizadas, y que existen buenas expectativas para un funcionamiento independiente una vez que termine el apoyo del donante.

A donor organization which makes resources available for activities in the developing countries is very conscious of its responsibilities; it must exercise great care if it is to succeed in promoting local self-reliance in accordance with the plans and priorities of the countries themselves. This is true in any field,

and it is certainly true in the information field. Once a donor has decided to put its money into a particular program, that program will be able to recruit the skilled personnel that are available locally; and, the people that are taken up for one program will not be available for any other program. Since human resources are scarce, if the donor makes an inappropriate choice, that very decision could easily frustrate better initiatives. It is for such reasons that a donor must be cautious, must consult with all appropriate authorities, and must act only when there is assurance that the program selected will enjoy political and technical support in the country or countries where it is to be implemented.

Perhaps the objectives of conscientious donors could be stated as follows:

- Donors want to help ensure that necessary work is done and that the product of the work is available to all who have a need for it, but they do not want to help pay for unnecessary duplication of that work.
- Donors want to be sure that work is done by the institution that is the most appropriate to do that work, and they recognize that it would be wrong to support work in one institution if national plans call for that work to be done in a different institution.
- Donors want to be sure that their support for new or on-going programs can be put within a reasonable time-frame, i.e. that

these programs stand a good chance of being continued using local resources once the donor support ends.

In the information field, as quite often in other fields, the establishment of a regional network gives confidence that these objectives will more likely be met.

### Avoiding duplication

From many types of information service, the clients would like to receive, not only the information produced within their own country, but also similar information produced by the other countries in the region. Yet, if institutions in several countries all separately try to collect and process information from the whole region, each will be doing essentially the same work as the others. This is obviously wasteful and, when a network is established, "work-sharing" is normally the prime objective. Within the network, the partners can divide up the operations according to some formula that will ensure that any particular task is done just once, and by the partner that is most appropriate to do it.

Most often, the formula for work-sharing is one based on geopolitical considerations. The partner in country X collects and processes the information published in country X, and the partner in country Y does the same for information published in country Y. This is a virtually unambiguous algorithm for work-sharing and is frequently used. Sometimes the work-sharing is based on a division by subjects, but since subjects tend to overlap and any one docu-

ment may treat more than one subject, the algorithm is more ambiguous and is not as frequently applied.

Whatever the algorithm, however, the decision to divide up work among the partners of a network gives assurance to the donor that it is not helping to pay for the same work to be done in several different places.

Contrast this with the situation that applies in the absence of a network. There are hundreds of small, inadequately-supported documentation centres in institutions throughout Latin America. Each one can rightly claim that, given extra resources (money for acquisitions, for staff, or for the training of staff), it will be able to do a better job for its clients. But a donor cannot support many such initiatives and, if it attempts to do so, it will quickly find that it is helping to pay for similar processing of the same documents at several places.

#### **Increasing the dissemination of benefits**

An equally important objective of a network is to ensure that the work done by any one partner is available to all the other partners. So each partner can, in turn, make available to its clients, not merely the product of its own work, but the totality of the work done within the network. Clients get a much more comprehensive service.

Traditionally, donors have always looked for a "multiplying factor" that will spread the benefits of the investments they

make. By its very nature, a network promises to fulfill this requirement.

Resolving the question of a "mandate"

While networks often result from a process of inter-governmental consultation and the designation, by individual governments, of the institutions that are to be partners, even the establishment of a non-governmental network requires a process of regional consultation. This process ensures that the qualifications of candidate partners are seriously considered, and that the ultimate selection of partners is the result of an informed judgment. Each partner then receives a "mandate", either from its government or from the professional community, to take on a defined role.

This process inspires the confidence of donors. It avoids the situation where a donor, in giving support to an institution that happens to make a good application, is still left wondering whether there might not be a "better" institution to do the same job. And, once a network is established, a donor has a rational procedure for dealing with applications from other institutions: one of the conditions of support can be that the institution be accepted as a partner in the network.

### Network management

A network must be managed. If the participants are to see themselves as equals, that management must be essentially democratic. This usually implies the establishment of some Steering Committee, and it may often require the identification of one or more individuals to act as an executive or coordinating staff to help implement the decisions of the Steering Committee. That staff may be permanently located within one of the partner institutions, or the responsibility may be rotated among the partners over a period of years.

But the establishment of a management mechanism and the identification of staff to implement its decisions, gives assurance to the donor that good ideas emanating from any one of the partners have the possibility of being adopted by all the other partners. The management mechanism provides a forum in which proposed improvements can be examined and a consensus developed for their acceptance.

Again, let us contrast this with a situation where the donor is supporting a number of entirely separate initiatives. In such circumstances, the donor is often in a position to evaluate the relative effectiveness of the different operations. And, inevitably, he would judge some to be more progressive and others to be in danger of growing stale. But the donor has no authority to impose change on the seemingly less effective operations and, if he

selectively withdraws his support, he may well waste some of his earlier investments.

There is another corollary to the establishment of a network and the participation of its partners in the network management. Each partner accepts, explicitly or implicitly, that he has obligations to the other partners. He will feel somewhat dishonored if he does not live up to these obligations. And, quite often, his authorities will see that the national reputation is at stake. A partner who feels that he is falling behind the others in the group can invoke such considerations in appealing to his authorities for the resources necessary to catch up.

#### Compatibility of methods

If the work done by one partner is to be merged with the work done by other partners, and if the entire product of a network is to be accessible to any one client, then a fairly high degree of standardization must be accepted. For example, the partners cannot use different rules for bibliographic descriptions or different thesauri for indexing. The adoption, by consensus, of the necessary standards is one of the principal tasks of the network-management system.

In fact, experience shows that an institution's decision to participate in a network will often lay to rest technical disputes that, otherwise, might endure for many years. If an institution is working by itself, and only for itself, it can choose its



own rules, but it is not subject to forces that will ensure that it makes an early decision or that it will stay with a decision even once it has been made. I am sure many of us can cite instances where, for example, a library has changed its classification system only because a new Chief Librarian has had a personal preference for a system other than the one that had been used before. The relative advantages and disadvantages of different methodologies are often quite small: these minor matters are overwhelmed by the much greater advantage to be obtained by joining a network and using whatever methodology it has adopted.

A donor gains confidence as the definition of a common methodology develops. Partly, this is again because the process helps to avoid duplication of work. If, for example, the network adopts a common thesaurus, the donor knows that he will not be confronted by several competing efforts to develop thesauri in the same field. Also, the donor is assured that work carried out under the program will not be invalidated by arbitrary changes in methodology. Once the working procedures have been defined, they will be changed only by agreement among the partners, and it is highly unlikely that the partners will agree collectively to make a change that would require going back over what has already been done.

Although the definition of methodologies for a regional network could take place within that one region, the donor can expect that the partners will take into account what is being done

in other regions and, where it exists, at the global level. A network, in choosing its methodologies, is much more likely than a single institution to opt for international standards. Here again, the donor is assured that procedures have been set in place that will facilitate interregional and global exchanges of data, even if these are not expected to take place immediately.

### Training

Donors find that, in submitting their requests, developing-country institutions often ask for a considerable investment in training. Donors recognize that this is important, but their resources are limited and they are anxious to improve the efficiency of training and to ensure, to the maximum degree possible, that the training given will actually be applied. In the absence of a network, the requests are often for training in a broader sense, typically at universities and, often, for a master's program that requires two years and a rather considerable amount of money. In such cases, donors wonder whether the trainee, on return to his institution, will actually apply more than a fraction of what he has learned.

Within a network, however, the training needs can usually be much more precisely defined. While there may still be a need to provide a broader education for the more senior network managers, the majority of the candidates will require only to be trained in the implementation of the network procedures that have been

agreed. With the experience of the last decade, we can now affirm, for example, that the two-week seminars that have been given in the AGRINTER/AGRIS framework have been largely successful in preparing trainees for the work they need to do. Such training can be carried out within relatively homogeneous groups of individuals, who have more or less the same needs, who can learn from each other as well as from their teachers, and who maintain a useful sense of community with each other long after the training ends.

Donors are usually much more ready to support this type of highly-focused training. It is relatively inexpensive, and it can be accomplished quickly. The results are more immediately seen and can be more easily evaluated. One is not dependent on other institutions that may have an imperfect appreciation of what is needed; indeed the network management itself can set up the courses and organize the training of its own participants. It is initiatives of this type that can best ensure a high degree of relevance.

#### Centralization versus decentralization

Even when it is decided to establish a network, there are a range of options with respect to the degree of centralization that might be applied. For example, in a bibliographic operation, should all records be identified, compiled and verified by the individual partners, and then be exchanged without any further processing other than that required to merge them? Or should the partners merely find the documents and send them to a central loca-

tion where the records might be prepared? Probably the answer depends on the quantity of information to be handled. If, for the entire network, there are only a few hundred items per year, it is hardly worth going to the trouble of training inputters in all the different locations. Unless each inputter has enough work to ensure that he builds on his experience, it can be counterproductive to distribute the tasks too widely. On the other hand, if there are a few hundred records to be prepared each year in each of the participating sites, then it is almost certainly desirable to train staff at these sites and to do the majority of the work there.

Generally speaking, a centralized solution is likely to be more credible if the topic is highly specialized, and if the operations can be concentrated in an institution that is recognized as a "centre of excellence" for work on this topic. The other partners would then act more as branch offices for the acquisition of relevant material and for disseminating the products of the service. The more decentralized solution is appropriate for a broader topic where much more information is to be gathered and where the individual partners themselves need to develop skills over the whole range of processing and operation. Donors will not want to invest substantially at many sites if the volume of information to be handled is small (they will be more comfortable in making the resources available to ensure that a very good job is

done at a central site). But donors will accept that investments need to be made at many sites when there is a lot of information to be handled.

There are some network activities for which a degree of centralization is always necessary (though each such activity need not necessarily be based in the same institution). For example, although all partners should be free to recommend modifications or additions to a thesaurus, the master copy of that thesaurus should be maintained at a single location and under the supervision of an individual with the necessary technical competence to pass judgment on the suggestions received. Also, there are purely economic considerations to be taken into account in determining how data prepared by each partner can be made available to all the others. If, for example, we have a network with 30 participants, it requires 870 separate transactions in every time cycle if each centre sends its data separately to the others. On the other hand, only 58 transactions are required if one centre receives data from all the others, merges these contributions, and sends a complete file back in return. It is always less expensive to do the merging at one site on behalf of all the others.

### Subject scope

Donors are more confident when a network has elaborated a very precise definition of the information scope to be covered in its activities. If the definition is vague, the donor realizes that partners will have difficulty in knowing what is, and what is not, to be included, and that this will lead to inhomogeneities and inconsistencies in their respective contributions. When the scope definition is vague, some inputters are tempted to include a lot of material that is either only marginally relevant or even irrelevant; other inputters may as easily leave out material that is relevant. The advantages of a network become more apparent when the partners agree to do the best possible job within a sharply defined field, and the advantages are much less apparent if they seek to cover a more ambitiously defined range of subjects and, inevitably, then fail to achieve comprehensive coverage.

### Summary

When I was invited to prepare this paper, I was asked to identify some of the key points that network institutions should bear in mind when making applications to donors. Of course, applications may either come from the institution that is providing the coordination for a network, or they may come from individual partners within a network. But in both cases, most of the following items apply:

- make sure that the network itself, as well as the individual partners, have clear mandates from competent authorities whether governmental or otherwise;
- make sure that the subject scope and coverage of the operation are precisely defined;
- adopt methodologies that are sufficiently elaborated to ensure compatibility within the network and with other similar activities elsewhere in the world (this includes the adoption of common tools, such as a unique thesaurus for the subject field);
- define management mechanisms that will give equal voice to all partners, thus permitting the development of the operations according to an evolving consensus;
- ensure that the sharing out of work among the various partners is done in accordance with an unambiguous formula, thus minimizing the possibilities for overlapping of efforts;
- accept some centralization of operations, particularly for those functions that require less effort than that of a full-time person at each partner institution;
- establish a training program for network participants covering those operations that are necessary for successful functioning;
- take into account the prospects, either present or future, for linking the network to similar initiatives in other regions of

the world; at the same time, ensure that the proposed activity does not overlap with existing activities already under way in the region;

- be prepared to offer evidence to a donor that the operation will not be permanently dependent on donor support, but has prospects for maintaining itself out of local resources within a reasonable time-frame.

I hope these considerations will provide a useful guide for your future cooperation with the donor community.